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ABSTRACT

This publication provides general background information and questions trustees and search committee members might ask as they interview search consultants to help in the search for presidents of institutions and it profiles search firms so that trustees and search committee members can make initial assessments as they look for consultants. A section on selection guidelines describes how a search consultant can help and describes the procedure for selecting a consultant. Suggested questions to ask a potential consultant include features of the search, time factors and scheduling, and characteristics of the consultant's practice. An illustrative code of ethics for a search committee is included. A directory contains profiles of 13 consulting firms, with details about principal personnel and staff, a list of institutions with which the firm has worked, and a review of some other work done and measures of success. (SLD)

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Presidential Search Guidelines and Directory

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About the Directory

The firms listed in this directory have a wide range of experience in conducting executive searches. To be included, each firm must have completed a minimum of three comprehensive searches for academic presidents since 1999—a reasonable number, we believe, that sets a minimum standard and enables search committees to conduct reference checks on firms with an established track record.

Readers should keep in mind that the firms themselves supplied the profiles and accompanying data. AGB counsels readers to conduct their own rigorous and thorough analysis of each firm's credentials, references, and background. Information included in this kind of resource changes frequently and readers should be certain to verify each firm's assertions. Inclusion in this publication does not constitute AGB's endorsement, nor does AGB claim to have included all firms that may qualify.

Readers who wish to investigate sources of general information about executive search may review the *Directory of Executive Recruiters* (www.kennedypub.com) and the 2001 edition of *Executive Recruiters of North America* (www.hunt-scanlon.com), or they may contact the Association of Executive Search Consultants (www.aesc.org).

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Foreword

A well-conducted presidential search is an opportunity for institution building; a wise board plans such a search carefully, with its institution's long-term welfare as the ultimate goal. With that in mind, the Association of Governing Boards of Universities and Colleges is pleased to provide the 2002 edition of Presidential Search Guidelines and Directory. ***Our intent is to help boards carry out one of their most important responsibilities: selecting their institution's chief executive.***

This publication has two purposes: (1) It provides general background information and questions trustees and search committee members might ask as they interview search consultants, and (2) It profiles search firms in a consistent format to enable trustees and search committee members to make initial assessments as they seek a search consultant matched to their institution's specific characteristics and needs. This challenge has become more difficult in recent years as the ranks of search consultants have increased.

Presidential search is a complicated process, and the stakes are high. AGB believes most colleges and universities conducting such a search can benefit from the services of a well-matched consultant.

Other AGB Resources

Well-conceived and well-conducted presidential searches go beyond the task of identifying an institution's next chief executive. They also help the institution take stock, chart future directions, and knit constituencies together.

Each spring, AGB conducts a workshop on presidential search at our National Conference on Trusteeship. These programs are conducted by experienced facilitators who have a thorough understanding of the complexities of presidential transition. Most are former chief executives.

In addition, AGB continues to offer its Presidential Search Workshop to member institutions at a time and place of their choice. This workshop can help your board understand all that lies ahead and how to move forward with confidence and success.

Search committee members will benefit from a careful review of *Presidential Search*, by Charles B. Neff and Barbara Leondar, and other related AGB publications listed on page 10 of this directory.

I wish to thank the consultants who have supported this project. This publication is better for their involvement. I also wish to express my special thanks to Bill Weary, president of Fieldstone Consulting. Bill wrote the guidelines based on his considerable expertise in chief executive search.

Finally, please help us make this volume better by noting your likes and dislikes. What might we do to make this publication more useful?

Please let us hear from you.

Richard T. Ingram, President
Association of Governing Boards of Universities and Colleges

Selection Guidelines

A good presidential search not only matches individual skills and interests with institutional needs but also strengthens the institution and offers boards an important opportunity to understand, unify, and plan. It is much more than finding the best next president. These broader institutional goals are met most effectively through a careful process that is designed in advance and involves a wide range of constituents.

How a Search Consultant Can Help

A good consultant can help a board realize a search's significant potential for institution building. According to your specific needs and wishes, and within the bounds of responsible search assistance, a qualified, experienced search consultant with whom your board or search committee has the right "chemistry" can help you do the following:

- prepare your board to address search issues unique to your institution (including whether to seek an interim president), adopt good search procedures, and charge your search committee appropriately;
- offer guidance on selecting and appointing a search committee—crucial to a successful search—and provide support and counsel to the committee chair;
- define confidentiality as it relates to your search, including applicable state legislation on open records and open meetings;
- advise on the handling of internal candidates;
- involve the institution's constituencies while maintaining your control of the process;
- build unity, vision, and strength throughout the institution;
- set a search calendar that corresponds to hiring windows and realistic estimates of the time required to complete a search;
- create a reasonable budget for the search process;
- identify the challenges the next president must address and the personal and professional characteristics the individual most likely will need to succeed;
- attract the best candidates through strategic advertising and recruiting, identify candidates otherwise unavailable to your search, screen the pool, check references, interview semifinalists, coordinate and assist with your finalists' visits to campus, and keep the board focused on the many serious implications of each decision;
- prepare competitive compensation packages and other contractual matters;
- plan media initiatives to advance the institution's best interests during and after the search;
- set realistic goals for the first year, offer guidelines for assessment of presidential and board performance in the years to come, and generally prepare the institution for new leadership; and
- handle any unforeseen emergencies.

Procedures for Selecting a Search Consultant

Whether the presidential-search committee or a special committee of the board is charged with selecting the consultant, the process probably should include the following elements:

- contacting friends and colleagues at neighboring and peer institutions who recently have concluded presidential searches to collect their observations, perspectives, and wisdom;
- reading the directory entries at the back of this guide carefully and noting the firms most likely to serve your institution's needs;
- conducting telephone interviews with representatives of five or more search firms (suggestions for interview questions appear on pages 4-9);
- receiving and reviewing the proposals and search materials sent to you by the firms you interviewed by telephone;
- checking references of the firms that are candidates for your institution's business;
- conducting personal interviews with representatives of those firms most likely to offer you appropriate knowledge, experience, and fit; and
- making an offer and signing a contract.

Final interviews with prospective search consultants will be most effective if you do the following:

- interview only those firms in which you have a genuine interest (generally limited to three);
- read proposals carefully, and complete reference checks with former clients before you invite presentations;
- interview firms one after another (ideally during a single day), allotting 60 to 90 minutes for each; and
- make sure all committee members are present for all interviews; a changing mix of interviewers can make for an uncertain final decision.

Abiding by these suggestions not only will enhance your understanding of the issues and help you make a sound selection, it also will produce a level of questioning that will help you rise above the inevitable tensions of the "shoot out" among firms.

A cautionary word here may help you learn still more about the firms you wish to consider carefully: Good presentations require considerable preparation, investments of time, and expensive—often last-minute—travel arrangements by the search firms. Search consultants understand the importance of doing their homework, and they appreciate your interest and thoughtful consideration of their candidacy. Moreover, a reasonably prompt indication of your final decision further recognizes the investment these firms make in preparing their presentations.

Finally, consider the possibility of paying part or all of the presenting firms' out-of-pocket expenses. Some firms—not just smaller ones—decline particularly expensive invitations and so deprive you of the chance to measure the quality of a good match. You might compromise by offering to pay half of the expenses for each firm you interview.

Questions to Ask

In the course of your preparation, you will have many opportunities to learn about search consultant candidates. Your institution's special needs will generate specific questions. The list of services a consultant can perform also will generate questions.

A sampling of broad questions to ask consultants follows. Some of these questions can be answered by reading this directory, others by checking references or consulting your own sources, and still others through conversations with the firms' principals. Brief context is provided for each question.

Remember throughout the process to develop a sense of the consultant's energy, style, articulateness, cultural match with your institution, integrity, and ability to teach you and your colleagues. Certainly, by the end of the review process, the search committee and the consultant should be moving toward a clear understanding of mutual expectations, especially with respect to responsibilities and the extent of the consultant's involvement.

1. What distinguishes your approach to presidential search from that of other individuals or firms? Would you describe your methods as being closer to a corporate or an educational model? What makes you different from the competition? How would we benefit because of your distinctiveness? What are the pluses and minuses of your approach? How would you assess a match between your style and our needs? How do other professional search consultants view you? How do your clients view you? Why do clients hire you? How do you measure your success?

There is a basic distinction between corporate and educational models of search. Educational models often are described as process oriented. This terminology requires careful examination. Note, for instance, the following:

- Search firms placing themselves at the process end of the spectrum (which means greater search committee and constituent involvement) tend to see their roles as helping the search committee and board make the best possible decisions. They believe the wisdom necessary to guide the institution can be found within the governing board and the institution, and that the role of the consultant is to draw that wisdom out. They also tend to speak in terms of strengthening the institution as well as finding the best president. References can tell you how successful a firm has been in this regard.
- Searches at the corporate end (less search committee and constituent involvement) rely more on the consultants' judgment to identify and screen candidates who are then presented to the search committee. Such an approach can proceed more rapidly and be particularly advantageous if the search must be conducted subject to stringent open-record and/or open-meeting laws.

Consequently, it is best to inquire about the level of search committee and constituent involvement various firms advocate. How much importance do the firms place on such involvement? This issue lies at the heart of the search and will generate productive, revealing conversations.

Remember that most firms understand the importance of incorporating some measure of constituent involvement in the searches they help conduct. You need to know how much and when—and feel comfortable with their answers. Appreciate versatility, but be wary of any firm's claim to do "whatever you want."

In most situations, AGB favors careful, responsible, and significant constituent involvement in the search process not only for the wisdom it provides but also for the buy-in it promotes. A presidential search is a means to strengthen the institution. Still, AGB recognizes that institutional leaders must analyze their own situations carefully before determining the desired extent of constituent involvement. If your board has strong views one way or another, it should state them at the outset.

2. How long does it usually take your firm to complete a presidential search? How does our sense of when we should start and finish compare with yours? Why? What is your record with respect to on-time completion of presidential searches?

A search at the process end of the spectrum probably will take four to six months (excluding the summer). Searches that last longer than six months often produce a shifting applicant pool and thereby risk losing key candidates. At the other extreme, more rapid searches sometimes risk sacrificing the goodwill of key constituent leaders.

The presidential hiring window for positions opening July 1 is widest from September through December. Search conclusions tend to occur from January through March or April. However, you can find a president at any time of the year—and some consultants would argue that this becomes easier each year. The objective is to maximize the pool from which you select.

3. How much is your fee for full-search assistance? What are your fees for the various options you provide? What can we expect in the way of expenses? How will payments be scheduled? What kind of contract do you use? What kind of guarantee—if any—do you offer? Can we back out of the contract at any point? Has your firm ever exceeded its estimate costs? If so, why and by how much?

Depending on the extent of the services you purchase, the firm you select, and your situation, costs can vary widely. The standard fee for a full search is one-third of the first year's cash compensation. Some firms cap the fee at a fixed sum. Firms handling a large volume with specific kinds of institutions sometimes lower their fees considerably. Negotiation on price always is appropriate.

Billable expenses will depend on the number of consultants who meet with you, the number and length of their on-site visits, the candidates they visit on your behalf, and the extent of their work on the telephone. Some firms send itemized bills of expenses; others charge a flat per diem that saves you and them time and trouble; others include a set number and type of expenses in their fee. Some bill only for out-of-pocket expenses; others also include—perhaps as a percentage of fee—administrative and overhead costs. For some, there will be travel expenses associated with a meeting between the consultant and the candidate; others do not hold separate meetings with candidates. Firms should provide a reliable sense of the billed expenses beyond the fee, the monthly amount, and how expenses will be invoiced.

Ask for some guidelines to help you estimate the total cost of your search, including the search consultant's fee and expenses and your own expenses, such as secretarial and other logistical support, stationery and postage, search committee and candidate travel, receptions, entertainment, relocation expenses for the new president, and so forth. Many institutions fail to consider these other expenses and are staggered by the total cost of their search. You want to know about any budgetary challenges at the outset. Keep in mind that appropriate expenditures in a well-conducted search constitute a sound investment in your institution's future.

Ask to have a sample contract sent to you and examine it carefully. If the contract does not specify terms of payment, obtain them. Payment of a significant portion of the fee upon signing the contract is common. Remember that you are working with retained and not contingency search consultants: That is, you are paying for their services, not for an appointed president.

Check the language of any guarantee or back-out clauses, and be sure you are comfortable with their meaning. If such clauses are not part of the contract, ask what would happen if you were to back out or if something unexpected were to occur in the first year to cause the new president's tenure to be terminated.

4. Tell us about your firm's principals and other staff. How long have you been together? How do you work together? If you will be our consultant, what is your background? If another person will be our consultant, who is that person and what is his or her background? What are the backgrounds of your colleagues? How many other staff do you have, and what are their roles?

You have every right to learn about the staff members of the firms under consideration. Some pride themselves on having been presidents and note that their network and understanding of the position give them an essential advantage; others argue that the skills necessary for success as a president are not necessarily germane to those required in a consultant. The key ingredient is long experience in presidential searches. Satisfy yourself that the candidates

have a workable network and the skills and temperament to work effectively with your board and the kinds of candidates you seek. Some firms use individual consultants on a part-time basis, as need arises. Inquire about this practice.

A firm that provides a teamwork approach may greatly increase the accumulated experience and wisdom brought to your search—if the members work as a team. An experienced individual may work every bit as well in some circumstances.

Some firms make extensive use of research assistants who generate applications, conduct candidate interviews, check references, maintain client contact, and perform initial screening. Others rely on associates who come with a higher level of expertise and experience than do research assistants and often function as consultants. Decide how comfortable you are with such arrangements and know the background of all individuals who will assist your search. In short, make sure you understand the range of positions in each firm's staff.

5. Who from the firm will lead this search? What other principals will work with you on this search? How will you divide tasks? What work will assistants or associates complete? Who will work with us on-site?

Most often, the person with whom you first speak is the consultant with whom you will work throughout the search. He or she will perform every task, including generating candidates and checking references. In some instances, a colleague who also attends meetings and performs certain tasks may assist the lead consultant. In a few firms, staff assistants may perform much of the work. You will want to ask about working arrangements and be comfortable with them. It is also wise to ask about the backgrounds and roles of all professionals who will assist the lead consultant during the search.

6. How many searches do you personally handle at a given time? Do you set a limit? How many searches does your firm usually accept at one time? What is your policy on conflict of interest among institutions you serve?

An often-heard rule of thumb is that a consultant can handle a maximum of five—or even as few as three—presidential searches at one time. But other variables can be more revealing. No consultant can begin five searches at one time and do an effective job. Ask not only how many searches the consultant currently is handling, but also where each is in the process. Ask consultants how they manage their time to make sure your priorities will be met.

Inquire about policy and practice. You might ask how many searches the consultant personally handles, and if any will begin soon. Ask if the consultant is conducting any searches for institutions comparable to your own, and if so, how he or she would handle candidate generation and possible conflict of interest. Ask whether the consultant ever turns business away. Find out how many searches he or she personally completed last year.

Done well, a presidential search is labor-intensive work, but with extensive support from a research staff, principal consultants sometimes can conduct numerous simultaneous searches at the presidential level.

7. How many higher education presidential searches did your firm conduct over the last year or two? What was the dollar volume of business in this and other areas?

Recognize that for some firms, this information is proprietary and cannot be provided legally. If it can be revealed, it will give you a helpful sense of a firm's size. You also may draw some conclusions about the firm's focus.

Extremely large numbers of completed searches are impressive, as are time-consuming searches in which consultants made special efforts to identify candidates from nontraditional sources. Consider carefully the many indicators of a firm's success and determine which mean the most to you.

As you peruse firms' lists of completed, full, presidential searches (all three criteria—completed, full, presidential—are important), check to see whether dates are indicated and

whether that president still holds the job. Remember that a strong record of presidents who "stick" is considered good evidence of a firm's success. In some instances, you may have to verify that all searches on a client list were completed by this firm alone and do not include those conducted by consultants who recently may have arrived from another firm.

8. What searches have you and your firm completed in the last two or three years for institutions similar to ours? To whom may we speak at each one of these institutions? For which of these institutions did you personally lead the process?

Consultants should be able to speak comfortably about the range of higher education institutions they have served and relate their experiences to your needs. They also should understand your unique situation. Recognize that the absence of an institution like yours among a consultant's searches may not be a significant liability. Consultants are generally versatile and know how to apply their expertise in widely varied circumstances. Exposure to many different kinds of institutions may help your consultant identify the unique characteristics of your own.

Even before any decision is made on whom to invite for a presentation, it is essential that you speak to references. As a starting point, consider these basic questions:

- Were they satisfied?
- Would they hire the firm again? The same individual consultant?
- To what extent did the institution as a whole benefit from this search?
- Where would references suggest improvement?
- Overall, what were the strengths and weaknesses of their search process?
- What would the institution have done differently?
- What has been their experience with the new president?

The information available from such reference calls cannot be obtained elsewhere. These routine checks can distinguish a good match from a bad one between a consultant and your institution.

9. What kind of searches—other than presidential—does your firm perform? Does your firm conduct searches for other nonprofit organizations or for-profit organizations? At what levels? Does your firm perform higher education searches other than presidential? Does the firm conduct any contingency searches? What are the numbers and percentages of each of these categories over the last several years? If your firm is part of a larger search or management-consulting firm, what part do presidential searches have in the company's overall revenue picture?

Be mindful of your comfort level with the various answers. Also be aware that for some firms, presidential searches can be a means to establish contacts with trustees who are influential in the corporate world. This is not necessarily inappropriate. How do you and your colleagues feel about that?

10. For this kind of institution, what do you believe constitutes an effective composition for the search committee?

Recognizing that institutions vary considerably in their missions, philosophies, and traditions, AGB recommends a search committee that is representative of the institution's primary constituencies. This practice builds campus unity, brings the institution's various perspectives and wisdom to bear on the search process, and creates the buy-in necessary to launch a new president successfully. Look for evidence of flexibility in meeting your institution's particular needs.

11. How do you assemble a group of candidates to present to us? What success have you had in attracting women and minorities as candidates, semifinalists, finalists, and placed presidents? How do you communicate with candidates during the search? How are you known for treating candidates?

Putting together a group of applicants is not a mysterious process. Experienced presidential search consultants possess networks of individuals with whom they can work fairly quickly; they probably have in mind a number of appropriate candidates for you from the start.

With some guidance, an active search committee also can generate its own recruitment network. Properly done, canvassing the field probably takes 80 to 100 contacts.

Your search consultant should provide most of that effort while guiding you on how you can use your contacts to assist with recruitment. A thorough search will create confidence within the committee and the campus community, and heighten the profile of your institution in other regions.

Firms should be able to provide you with statistics on their success in recruiting women and minorities. For more information, see *The American College President: 2000 Edition*, by Marlene Ross and Madeleine F. Green (American Council on Education).

How did candidates feel about the process? Candidates can express reluctance to work again with some consultants. Well-treated candidates remember your institution, as do those who have been treated poorly. Moreover, consultants with a negative reputation in this regard may have difficulty attracting suitable candidates; as a consequence, your promising applicant pool may be diminished.

12. How do you enter your candidates into the pool? How does the search committee work with them? How do you measure success in generating candidates?

Some firms place their candidates in the pool and allow the search committee to select as it sees fit. These firms take pride in pointing to the percentages of semifinalists, finalists, and presidents they placed into the pool. They should be able to provide their statistics. An average of about 50 percent for each group is appropriate.

Other firms may perform the initial screening themselves and advance their own candidates to that point. This is not necessarily inappropriate, but you need to know how the firm will work and be comfortable with it. Firms can adapt their methods to your own needs and preferences in this regard.

13. What are the basic components of the search, as you prefer to lead it? What expectations do you have of us, and what expectations should we have of you?

Typically, once a firm is selected, the consultant will conduct a presearch visit to identify the institution's assets and needs, and subsequently develop a profile of the next president's desired characteristics. (Keep in mind that some consultants highlight this as a major activity; others minimize it and worry about the temptation of a search committee to play the role of an institution wide planning committee.)

The firm will help write and place advertisements and profiles and offer guidance in generating appropriate correspondence and handling confidential records. It will also recruit candidates, help the search committee conduct its own aggressive recruiting, and work with the search committee to review applicants' folders and identify semifinalists.

A consultant can help you guard against unhelpful contact between candidates and individual members of your search committee. Some consultants will handle all correspondence and secretarial support functions for you.

Firms also help conduct reference checks on semifinalists or active candidates, and offer guidelines to your search committee to protect candidates' privacy. Firms should provide protocols and procedures for conducting semifinalist interviews. Some consultants strongly urge that they be part of such interviews; others believe they should not be present. Some use interactive television and video "performances" in the interview process. This practice can be more helpful with some candidates than with others.

Consultants also make suggestions for holding on-campus visits of finalists and appropriately involving the campus community; advise the search committee on final negotiations, compensation setting, and contract writing; and offer guidance on how to ensure a smooth transition. In general, consultants help you focus on the larger picture of the search and its many different and challenging stages.

It is particularly important to feel confident about each firm's skills and success in preparing a profile of desired leadership characteristics. Accurately and sensitively compiled, such a statement attracts appropriate candidates in advertisements, permits aggressive recruiting, and serves as a reliable, objective guide for screening credentials, checking references, conducting semifinalist and finalist interviews, and making an offer.

A well-designed process for compiling the statement also helps to draw together and focus the entire institutional community. Ask for samples of such statements from candidate consultants, with institutional names blacked out if appropriate. Recognize that clients and firms can differ on what they consider confidential.

You should have a clear understanding of how each of the firms proceeds in all of the foregoing areas. The AGB Presidential Search Workshop (a description of which can be found on page 10) can facilitate the search committee's or the governing board's decisions by presenting the options and the standards against which to compare firms and consultants. So too, can a careful reading of *Presidential Search: A Guide to the Process of Selecting and Appointing College and University Presidents* by Charles B. Neff and Barbara Leondar, widely considered the standard in the field. (AGB publishes helpful publications on the search process. See page 10 for a complete list.)

14. If you work with public colleges or universities, what procedures have you found useful in working with open-meeting and open-record laws? What alternative approaches should we consider? How do you evaluate each of them?

From AGB's perspective, candidates should be guaranteed confidentiality until they become finalists, and search committee deliberations should be closed. Nevertheless, key procedures and traditions can vary considerably.

To gain the most from these questions about confidentiality, you should do some research on applicable practices and legislation. Experienced firms should be aware of the various constraints placed upon presidential-search committees and how to address them. Recent experience in your state can be an advantage, but it should not be a requirement. Listen carefully to the quality of questions the consultants ask you on this subject.

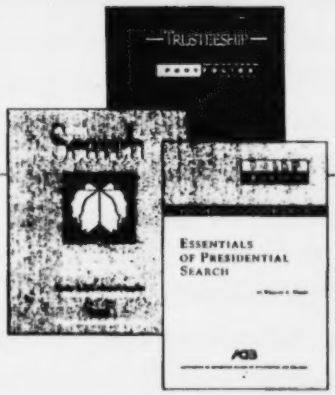
14. Can you give us an example of a search that went particularly well from your perspective? One that did not? What made the difference? In your experience, what undermines a good search? What produces a good search?

Check for openness, respect for confidences, the ability to teach you, and wisdom.

Making an Offer

You are ready to make a decision when you and your colleagues have done your research, read all relevant materials, checked references, become comfortable with styles and personalities, satisfied yourselves with each firm's answers to your questions, and acquired confidence in the chosen individual's and firm's abilities to represent and guide you.

Congratulations on your careful review and sound selection.



Additional Resources

AGB publishes an extensive array of resources specifically designed to help governing boards conduct successful presidential searches. To find out more or place an order, call AGB's Publications Department at 800/356-6317 or visit AGB's Web site at www.agb.org.

Presidential Search Package

Everything your search committee needs to prepare for a successful presidential search is available in this special package.

Three Books

- *Presidential Search: A Guide to the Process of Selecting and Appointing College and University Presidents*
  By Charles B. Neff and Barbara Leondar
- *Presidential Search Guidelines and Directory*
  Guidelines compiled by William A. Weary
- *Presidential Compensation in Higher Education: Policies and Best Practices*
  By Robert H. Atwell and Jane V. Wellman

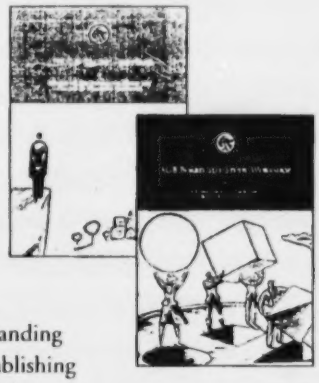
AGB Member Bonus

- When you purchase AGB's Presidential Search Package, you will receive *The Well-Informed Candidate: A Brief Guide for Candidates for College and University Presidencies.* By Robert H. Atwell, Madeleine F. Green, and Marlene Ross

Other AGB Publications about Presidential Search

- "Essentials of Presidential Search," a *Board Basics* booklet By William A. Weary
- *The Interim Presidency: Guidelines for University and College Governing Boards*
  By E.K. Fretwell
- "Finding a New President: Advice for Boards," a *Trusteeship* portfolio. *Available only to AGB members.*

Programs and Workshops



AGB also conducts Presidential Search Workshops for boards and search committees. The workshop provides an overview of the search process, the principles of best practice, sample forms and procedures, and practical step-by-step advice.

Typical agenda include understanding the search committee's charge, establishing leadership criteria, recruiting candidates, screening credentials, interviewing semifinalists, completing the final steps (including drafting recommendations), and an analysis of what to consider when using a consultant. For more information, call the director of On-Campus Programs at 202/296-8400 or send an e-mail message to mayak@agb.org.

Illustrative Code of Ethics

A growing number of search committees are adopting formal, written codes of ethics to guide their work. As a starting point, committee members may find the following illustrative statement helpful as they develop a code of ethics that best suits their institution and search.

By my signature below, I pledge to adhere to the following:

1. As a member of the search committee, I accept my responsibility, shared by my fellow committee members, to protect the integrity of the institution, and all prospects, semifinal candidates, and final candidates.
2. I acknowledge that only the chair of the board of trustees is authorized to speak to the news media on behalf of the board and only the chair of the search committee is authorized to speak to the news media on behalf of the search committee.
3. I certify that I am not a candidate for the position.
4. I agree to disclose promptly to the committee any appearance of real or potential conflict of interest in a relationship between me and a prospect or candidate.
5. I acknowledge that information management is a crucial component of the search committee's work. This work includes information developed and received about prospects, candidates, and their employing institutions. I understand this effort is necessary to attract high-quality finalists, to avoid putting their current positions in jeopardy, and to protect my institution's integrity. Specifically, I will adhere to the following principles:
   - I will respect the absolute confidentiality of all prospects and candidates. I will not reveal the identity of or any other information about prospects and candidates before or after the committee completes its work.
   - I will be fair, accurate, honest, and responsible in my management of information germane to the search.
   - I will guard against inaccuracies, carelessness, bias, and distortion made by either emphasis or omission of information.
   - I will strive to treat issues impartially and handle controversial subjects dispassionately. I understand that prospects and candidates who have held executive positions and made difficult decisions have not been in positions to win popularity contests.
   - I will give accurate and complete reports on candidates to the search committee chair.
6. I will place the best interests of the institution ahead of all special and personal interests and I will use common sense and good judgment in applying ethical principles to search work.
7. I consider the letter and spirit of this statement to be a matter of personal responsibility.

Signature *Date*

This illustrative model is based on a statement developed by Jan Greenwood, vice president, education practice at A.T. Kearney Executive Search, and Marlene Ross, program director at the American Council on Education, which they published in Educational Record, Spring/Summer 1996. It is adapted with permission. Their statement draws upon a code of conduct developed by Frances Hesselbein (noted authority in nonprofit governance) for presidential search in the Independent Sector and a code of ethics devised by the Associated Press Managing Editors organization.

Academic Search Consultation Service

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- *Patricia T. van der Vorm*

Full Academic Presidential Searches Since 2000

2001

Adirondack Community College
Alma College
Antioch University
Bemidji State University
Bethany College (WV)
Bridgewater State College
Capital University
Carleton College
College of the Southwest
Columbia College (SC)
Corning Community College
Dowling College
Eastern Illinois University
Ferrum College
Fisk University
Florida Institute of Technology
Garrett-Evangelical Theological Seminary
General Board of Higher Education and Ministry of the United Methodist Church
Hofstra University
Lake Forest College
Lake Superior State University
Lexington Theological Seminary
Lynchburg College
Maine College of Art
Massachusetts College of Liberal Arts
Medaille College
Minneapolis College of Art and Design
Minnesota State University-Mankato
Montserrat College of Art
National Humanities Center
North Carolina Wesleyan College
Northern Baptist Theological Seminary
Northland College
Northwestern Health Sciences University
Our Lady of the Lake University
Reinhardt College
Rockford College
Rosemont College
Southwest State University (MN)
SUNY-Farmingdale
St. Augustine College
Thomas More College
Thomas University
Towson University
Unity College
University of Maine-Augusta
University of Maine-Fort Kent
University of Maine System
University of Nevada - Reno
University of Toledo
Washington and Lee University
Westmont College
Widener University
Wilkes University
Worcester State College

2000

Ball State University
Beloit College
Candler School of Theology
Clark University
College of Santa Fe
Elms College
Empire State College
Hartford Seminary
Indiana State University
Kishwaukee Community College
Millsaps College
Montana State University
Tusculum College
University & Community College System of Nevada
University of Maine-Machias
University of Minnesota-Morris
William Jewell College
Williams College
Wor-Wic Community College
Youngstown State University

Founded as a nonprofit in 1976, Academic Search Consultation Service is the oldest and largest firm in the nation devoted exclusively to executive search in higher education. Academic Search has completed over 600 searches, more than 500 for presidents, chancellors, and other chief executives of colleges, universities, and community colleges.

Operating Principles, General Approach, Typical Process

At Academic Search, our goal is not just to select a person but to launch a successful presidency. Toward that end, our work proceeds on several principles:

- Every search begins with our spending extended time on campus, learning the institution's culture and needs. Based on our mutual understanding of those needs, every candidate pool is recruited from scratch.
- The search is a cooperative effort of the client and Academic Search, with the client always having final authority. Only when committees feel fully responsible for each step in a process will they wholeheartedly embrace the end result.
- In the process leading up to the appointment of a chief executive, intensive listening to the institution's key stakeholders—its faculty, students, alumni, donors, and community representatives—will pay many dividends for a new presidency.
- Because campus leaders often know our consultants personally and respect the ways we work, they return our calls and respond with confidence to our inquiries—important advantages in candidate recruitment and investigation.
- To assure fullest possible attention to client needs, all Academic Search consultants limit their assignments to 5-6 a year, and to not more than 2-3 at one time.
- What happens after a new president is announced can be just as important to later success as anything that occurs before. Academic Search is so committed to a president's success that we offer boards and presidents-elect continuing advice on issues of transition and start-up....this from the distinguished former chancellors and current board members on our professional staff.

Searches conducted by the Academic Search Consultation Service follow a time-tested yet flexible process. Each phase is supported by specific professional services.

- Organize the Search Process. Academic Search works with the client to set specific goals for the search process and develop an infrastructure to ensure success.
- Analyze Institutional Needs and Prepare Recommendations. Academic Search interviews college constituencies and becomes knowledgeable about college culture and requirements. This phase is essential to defining the characteristics required in a president and identifying appropriate candidates.
- Recruit a Strong Candidate Pool. Academic Search activates its extensive networks to identify candidates capable of providing top quality leadership.
- Identify the Most Appropriate Candidates. Academic Search and committee members refine the list of potential candidates.
- Interview Leading Candidates and Develop the Committee's Recommendation to the Board of Trustees. The committee, with Academic Search's help, selects those candidates best qualified to serve as president of the institution.
- Negotiate with the Leading Candidate and Facilitate the Appointment. Academic Search assists with negotiation of specific contractual terms between the finalist and the institution.
- Launching a Presidency. Once the individual is selected, Academic Search will facilitate, as requested, an initial planning and agenda-setting meeting between the board and the new president, and provide appropriate transition-related advice.

During the search, the Academic Search consultants attend approximately seven meetings with the search committee and/or board. The consultants ensure that all necessary agenda and supporting materials are prepared in advance of these meetings.

Professional Staff Who Work on a Typical Search

Each search is served by one or two senior consultants. All the key work on Academic Search's side of this partnership will be done by senior principals of the organization. This is notably true of the most crucial, value-adding parts of our assignment: candidate recruitment, candidate investigation, and process guidance. Academic Search stands out in not using research associates, "team members," or junior staff in search.

Academic Search's work, in essence, is that of 19 talented search consultants, whose cooperation increases each one's ability to serve exponentially. As a consultant begins work with a client search committee, he or she has 18 colleagues who will nominate and help recruit candidates, vet lists of finalists, and be on call for the client's new chief executive as she or he prepares to assume office.

For information about our principal consultants, please visit our web site.

Other Work the Firm Conducts

Academic Search also assists clients with searches for chief academic officers. These searches account for approximately 20 percent of our business. On occasion, Academic Search will assist the boards of nonprofits with an educational mission in searches for chief executives.

Measures of Success

- Of the presidents appointed with our assistance since 1995, 94 percent are still in office.
- Our 10-year data show 80 percent of those appointed with our help are still in office. In view of national data showing an average tenure of 6.9 years for university presidents, it is clear that the Academic Search process works.
- Since 1999, 25 percent of our clients have appointed presidents who are women and/or members of American minority groups.

Association of Community College Trustees

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Full Academic Presidential Searches Since 1999

2001

Santa Fe Community College
Northwestern Michigan College
Chaffey College
Mt. Hood Community College
Cerritos College
North Arkansas College
Northeastern Community College
Metropolitan Community College
Wenatchee Valley College
Hawkeye Community College
Portland Community College
Owens Community College
Chabot-Las Positas CCD
Merritt College
Vista Community College
Community College of Southern Nevada
Richland Community College
Taft College
College of Alameda

2000

Maricopa Community College District
Mott Community College
The City University of New York
- Queensborough Community College
- LaGuardia Community College
- Kingsborough Community College

Onondaga Community College
North Dakota State College of Science
Black Hawk College
Umpqua Community College
Spokane Community College
Laney College
College of the Mainland
Illinois Central College

1999

Grand Rapids Community College
Prince George's Community College
Northeast Mississippi Community College
Contra Costa College
Community College of Baltimore County
Essex Campus, The Community College of Baltimore County
Catonsville Campus, The Community College of Baltimore County
Dundalk Campus, The Community College of Baltimore County
Community Colleges of Spokane
West Valley-Mission Community College District
Mission College
State Center Community College District
Danville Area Community College
Community College of Beaver County
Fox Valley Technical College
Higher Colleges of Technology (UAE)
San Joaquin Delta College
Spokane Falls Community College

The Association of Community College Trustees (ACCT) is a nonprofit educational organization that represents more than 6,000 governing board members of community, technical, and junior colleges. ACCT is committed to developing effective lay governing board leadership. ACCT's Office of Board Leadership Services provides direct services exclusively to member governing boards. This includes assisting searches for presidents and chancellors, facilitating board retreats, and providing interim chief executive officers. Trustees and presidents throughout the country hold the ACCT search service in high regard. Why? Our reputation for professionalism and equity ensures a national pool of highly qualified and diverse candidates.

Operating Principles, General Approach, Typical Process

ACCT is the only professional search consulting organization that (1) focuses on the two-year community and technical college fields, and (2) has a 20-year history of providing successful services to colleges and districts throughout the United States.

Through its Search Services, ACCT works with the governing board and all college constituencies to assess institutional needs, and to develop and facilitate a process for identifying and employing a chief executive who meets the needs of the institution. As a trustee service-oriented organization, ACCT uses its experience to assist governing boards in fulfilling the selection and evaluation process.

ACCT has provided executive search assistance to more than 275 community colleges over the past 20 years. The search fee is based on the college's or district's enrollment. ACCT sets the standard for conducting community college chief executive officer searches. We are uniquely able to provide comprehensive search assistance, suggestions on process and search materials, and guidance to governing boards.

The six primary phases of an ACCT search process are: 1) institutional analysis and profile development; 2) candidate recruitment; 3) candidate evaluation; 4) confidential interviews; 5) candidate visits to the college and community, site visits to the leading candidate's current (and former) institution; and 6) selection of the new chief executive officer. The important components of the ACCT search process include communication, confidentiality, and the search committee.

Professional Staff Who Work on a Typical Search

The Search Service staff includes the director of board leadership service, the associate, 7 principal consultants located throughout the United States (all retired presidents and trustees), 11 board retreat facilitators, and 10 reference technicians.

Other Work the Firm Conducts

- The ACCT Office of Board Leadership Services conducts searches for executive positions such as community college state directors, equivalent positions to campus presidents such as executive deans, and campus directors and district level positions that supervise presidents such as executive vice presidents.
- ACCT specializes in working with states that have Sunshine Laws. We will conduct invitational searches and assist with recruitment and referencing. The Office of Board Leadership Services is very flexible and will design the search to meet the needs of the institution.
- ACCT provides comprehensive board retreat leadership services to boards of trustees and presidents for the purpose of strengthening leadership and decision-making. Services include designing and facilitating board retreats, placement of interim presidents, evaluation of the president, board self-evaluation and confidential services. Confidential services include intervening when the board and chief executive's relationship would benefit from the assistance of an experienced, external and professional facilitator.

Measures of Success

- ACCT is the national leader in successful searches for presidents and chancellors of community colleges with more than 275 successful searches.
- Community colleges are our business and only business. We are accountable to board of trustees and know intimately the workings of community colleges.
- ACCT's relationships within community colleges, other higher education institutions, and business and industry (through the trustee database of 6,000 community leaders) ensure the broadest possible recruitment of exceptional candidates.
- ACCT has an outstanding record of proactive identification of minority and female candidates. More than 50% of chief executive officers selected by governing boards in an ACCT search have been minority and/or female candidates.
- Upon the completion of each search, the college evaluates the ACCT Search Service performance, which is consistently rated as outstanding.
- Many of the colleges return to ACCT for their next presidential search.
- We maintain contact with all of the colleges where we have assisted with searches, and many of the board members and presidents attend our national conference for training and to strengthen their relationship.

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Full Academic Presidential Searches Since 1999

2001

Centenary College
East Carolina University
Eastern Kentucky University
Georgetown University
Goucher College
Pennsylvania State System of Higher Education
Smith College
Southern Illinois University, Carbondale
Stephen F. Austin State University
University of Kentucky
University of Wisconsin, Green Bay
University of Wisconsin, LaCrosse
University System of Georgia

2000

Alfred University
American Council on Education
Baton Rouge Community College
Bowdoin College
Bowie State University
Central Michigan University
Chicago Council of Foreign Relations Inc.
Ramapo College of New Jersey
St. Norbert College
The New School University
University of Wisconsin, Extension
University of Wisconsin, Oshkosh
University of Wisconsin, River Falls
Westminister College

1999

Cazenovia College
Colby College
Community College of Philadelphia
Fairleigh Dickinson University
Georgia Southern University
Mercy College
New Jersey Commission on Higher Education
Occidental College
Oglethorpe University
Raritan Valley Community College
University of Michigan, Flint
University of North Carolina at Asheville
University of Toledo
University of Wisconsin, Whitewater

Founded in 1992, the Education Practice within A.T. Kearney Executive Search is committed to serving educational and other related non-profit organizations. Our team is composed of professionals who have committed their careers to education. A.T. Kearney Executive Search is the only executive search organization that is part of a leading global management consulting firm. The executive search division has 29 offices in the Americas, Asia, Pacific, and Europe, and three affiliated offices in New Zealand. Since 1995, A.T. Kearney has operated as a subsidiary of EDS.

Operating Principles, General Approach, Typical Process

The A.T. Kearney Education Practice is committed to helping clients identify and recruit the best candidate to meet the institution's leadership needs. To do this, we take the time to learn about the opportunities and challenges presented by the position. We work with the committee to articulate the criteria for a search. Our experience gives us a good sense of best practices in conducting searches and we will recommend these strategies to the committee, but we also are flexible in exploring new methods to meet the needs and traditions of the institution.

Based on the committee's criteria, we aggressively recruit candidates who best match leadership requirements. Our contacts in education, foundations, government, and business are extensive. We are committed to identifying diverse candidate pools and have a solid track record of placing qualified minority and women candidates in significant positions. To ensure accurate records and timely communications with candidates, we assist the search committee in developing record-keeping systems to track applications, nominations, declinations, withdrawals, and eliminations.

Once the candidate pool is assembled, we support the committee in evaluating candidate files, conducting interviews, and completing reference checks. During the final stages of the search, we work with the board and final candidate(s) to ensure a successful conclusion. Throughout the search, we are proactive and responsive communicators and committed to absolute integrity and professionalism.

Professional Staff Who Work on a Typical Search

The Education Practice is composed of twelve professionals, three independent contractors and the administrative search support staff. The team serving each client is developed for that specific assignment.

- *Shelly Weiss Storbeck, Managing Director and Vice President*
  With over 10 years experience, Shelly Storbeck has worked on more than 300 searches for colleges, universities, and other nonprofit organizations. Prior to her career in executive search, she was the assistant to the president for educational affairs at Haverford College and a teacher at the Baldwin School and Phillips Academy.
- *Lesley A. Boyd, Director*
  Lesley Boyd began her career as the administrative officer of the Education Practice and has been promoted from senior associate to director. She has worked on more than 60 searches for various educational and nonprofit organizations.
- *Charles I. Bunting, Ph.D., Vice President*
  Prior to joining A.T. Kearney, Chuck Bunting was chancellor of the Vermont State Colleges, served as a vice president at Vassar College, and as a founder and director of the FIPSE program in Washington, D.C. He has more than 15 years experience conducting top-level searches.
- *Ann Hayes Die, Ph.D., Vice President*
  Ann Die served president of Hendrix College, dean of Sophie Newcomb College, associate provost at Tulane University, assistant vice president for academic and student affairs at Lamar University, Chair of the American Council on Education, and fellow in academic administration at the College of William and Mary. She also served as chair or president of six national higher education bodies including the National Association of Independent Colleges and Universities and National Collegiate Athletic Association Division III Presidents Council.
- *Jean A. Dowdall, Ph.D., Vice President*
  Jean Dowdall has 25 years experience in higher education as a faculty member, dean, vice president for academic affairs, president, and trustee. In addition to a large number of presidential searches, she has carried out many searches for chief development officers.
- *Jan D. Greenwood, Ph.D., Vice President*
  Jan Greenwood is in her tenth year in executive search. She held two presidential positions in private and public higher education institutions prior to becoming an execu tive search consultant and has conducted several hundred searches for executives in education, healthcare, nonprofit, information technology, and for corporate board positions. She also serves on a university board of trustees.
- *Alberto Pimentel, Director*
  Alberto Pimentel has more than eight years experience conducting senior level executive searches for private and public colleges and universities, K-12 school systems, governmental agencies, foundations, and various other non-profit organizations. He is based in Los Angeles and serves clients in the Southwest and on the West coast.

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Other Work Conducted by the Firm

- The Education Practice also performs searches for provosts, deans, vice presidents, and other administrators for four-year and two-year institutions, independent schools, and other nonprofit organizations. Approximately one-third of our search work is devoted to presidential search.
- A.T. Kearney consultants outside the education practice conduct senior-level searches in almost all industries. Colleges and universities seeking presidential candidates with corporate backgrounds can draw upon this resource.

Measures of Success

Our success is measured by the satisfaction of our clients. During each search, we stay in close contact with committee members, trustees, and the candidate to monitor satisfaction with the process and the final placement. The firm also administers an institutional quality program with surveys sent to clients for evaluation. The Education Practice regularly receives outstanding evaluations from clients, and is often invited to carry out additional searches.

Auerbach Associates, Consulting and Executive Search

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Full Academic Presidential Searches Since 1999

2000
New School University
University of Michigan-Dearborn

1999
Moore College of Art and Design

Founded in 1986, Auerbach Associates is a purposefully small and highly focused search firm that partners with colleges and universities, institutions supporting scholarship and the arts, foundations, and other non-profit organizations dedicated to serving the public good and creating an educated citizenry. Our largest area of practice is higher education, where we possess extensive experience and a distinguished record of success working with boards and search committees to recruit senior leaders.

At the presidential level clients have included the Massachusetts General Hospital's Institute of Health Professions, Wheelock College, and Pine Manor College. The insights we bring are deepened by our work at all senior levels and across all academic and administrative areas.

In academic fields, we have assisted clients with searches for deans and provosts at the University of Michigan, New School University, New York University, the College of William and Mary, and University of Pennsylvania, to name several examples. Recent senior administrative searches have included financial vice president and treasurer for Colgate University, vice president for research and technology management at Case Western Reserve University, and vice provost for enrollment management at the University of Southern California.

Our clients include public and private universities and liberal arts colleges of all sizes and scope. Our breadth provides us with a detailed understanding of how all functions of a university must interrelate to support the core academic mission.

Operating Principles, General Approach, Typical Process

Our approach to search combines recruiting with the organizational consulting that logically precedes and follows a major leadership change. We act as a bridge between candidates and our client, and we take responsibility for helping a search committee manage the search from the first to the final stage.

In addition to our highly focused approach to the search and our sensitivity to the distinctive characteristics of our individual clients, we also have a notable commitment to and record of success in the recruitment of women and underrepresented groups. Each of these attributes allows us to bring added breadth and experience to a search.

We begin each search with a meticulous evaluation of the challenges and leadership needs of our client. During site visits, we typically meet with trustees, the search committee,

key administrators and faculty, and other stakeholders to understand the institution, its goals, and the challenges and responsibilities for the new leader. We frequently hold open meetings with groups such as students, alumni, and the faculty senate to gather information and build consensus. These visits are the first step in developing a close working relationship with our client. The strength of these relationships underscores our commitment to client service and enhances ongoing communication during the search.

Based on what we learn during these site visits, we and our client develop a profile calibrated to ensure that the particular leadership qualities and styles that suit certain strategic challenges are matched to the specific demands of the environment in which a president will lead.

With this broad profile as a guide, we identify outstanding leaders whose experiences, abilities, and attributes may fulfill the needs of the institution. Many of these prospective candidates are drawn from our own networks of current presidents, provosts, chancellors, foundation executives, and government leaders, as well as distinguished individuals with significant experience and interest in higher education. Each possible candidate will have the potential to lead the school during its next period of evolution and achievement.

We present the position to prospective candidates and we confidentially develop background information on each for the search committee. We personally meet and interview the most promising candidates on several occasions to evaluate their potential for excellence in the position and to assure that we and our client appropriately evaluate their breadth of academic and administrative success, their commitment to inquiry and the pursuit of academic excellence, and their ability to enter smoothly into an institution's culture.

From this work the committee then selects a group of the best candidates to interview. We also assist in planning additional campus visits, either confidential or open.

Once the committee selects a final candidate to recommend to the full board we serve as a liaison between candidate and board, and we can assist, if requested, with the structuring of a recruitment package.

Professional Staff Who Work on a Typical Search

Presidential and the most senior searches are led by one or both of the firm's two principals.

- *Judith A. Auerbach, Founder and President*
  Judith Auerbach has conducted senior-level searches in higher education for fifteen years. She founded Auerbach Associates after two decades in academic publishing and in the practice of law. She is a graduate of Barnard College, the Graduate School of Arts and Science at Columbia University, and Boston College Law School.
- *Nicholas S. Brill, Vice President*
  Nicholas Brill was educated at Colgate University and the Harvard Graduate School of Business Administration. He possesses a broad and varied background in health care, social services, and higher education.

For each search, they are able to call upon the resources of a group of consultants who bring complementary talents drawn from advanced training, experience, and intimate knowledge across a diverse range of academic and professional disciplines. Three skilled administrative staff support the firm's search efforts as well. Biographies of all members of the firm can be found at our website.

Measures of Success

Our work is informed by our deep commitment to going beyond simply "filling a position" and looking for qualities of leadership and integrity that distinguish the best. We measure success by the extent to which an outcome fully satisfies the strategic goals articulated by our clients at the onset of the process. We have a strong record of client satisfaction, evidenced by the frequency with which we establish long-term partnerships following our first search.

We also pride ourselves on the depth of the candidate pools we assemble. In building a pool we focus on evaluating both the necessary competencies for a position and the institutional and interpersonal context that will attract and inform a successful leader. We consistently ensure that our clients have a choice of a diverse and strong range of individuals; more than 50% of our appointed candidates are women or people of color.

After the conclusion of a search, we remain in contact with our clients and final candidates to monitor satisfaction with our process, the transition, and its outcome. Well over 90% of our appointed candidates remain in their positions, or are promoted within the institution during their first five years. The lasting value these candidates bring to our clients is one of our most important measures of success as well as a source of great satisfaction.

We look forward to working with your institution.

Ayers & Associates, Inc.

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Principals

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  President and Founder
- ***Danita M. Ayers***
  Principal
- ***David Wilson***
  Senior Associate

Full Academic Presidential Searches Since 2000

2001
Saint Paul's College
Voorhees College

2000
National Action Council for Minorities in Engineering, Inc. (NACME)

Ayers & Associates, Inc. is a retained executive-search and management-consulting firm. We specialize in the recruitment and placement of talented leadership on a permanent or interim basis, as well as in the development, implementation and assessment of strategic initiatives. With a strong commitment to diversity, our firm assists many clients with the recruitment and placement of professionals from racially and ethnically diverse backgrounds. Ayers & Associates, Inc. also helps many clients develop and manage programs targeted towards these diverse groups. Our client base encompasses education institutions, philanthropic organizations, corporate entities and other professional organizations.

Operating Principles, General Approach, Typical Process

Ayers & Associates, Inc. utilizes a collaborative approach to the search process consisting of the five following distinct but integrated phases:

- Developing a search plan that takes into consideration the institution's issues and priorities, position specifications, and recruitment strategies;
- Developing a position description which articulates specific responsibilities, statement of qualifications, and preliminary selection criteria;
- Identifying a candidate pool and cultivating appropriate candidates;
- Screening and evaluating candidates which includes developing screening criteria, conducting interviews, assessing candidate files, and conducting reference checks; and
- Assisting in the selection of a finalist which includes arranging committee interviews, organizing campus interviews, completing reference and background checks, and consulting with the institution on the appropriate compensation package.

Professional Staff Who Work on a Typical Search

- *Dr. George E. Ayers, President and Founder*
  George E. Ayers has over 40 years of experience in higher education and over 12 years as an executive search consultant. He has served as president of three colleges and universities and vice president for academic affairs for a national state college and university association. In addition, Dr. Ayers has provided consulting services to numerous education institutions, philanthropic entities, corporations and other organizations throughout the United States, Latin America and Asia. Dr. Ayers is active in many professional and community organizations. He has authored over 75 publications on education and has lectured extensively throughout the world on educational issues.
- *Dr. David Wilson, Senior Associate*
  David Wilson, a senior associate of the firm for the past four years, has over 10 years of experience as an associate provost at two different research one universities. He also has experience as a senior executive officer in a major foundation. He serves on the board of directors for several educational and community organizations, and has authored several publications.
- *Ms. Danita Ayers, Principal*
  Danita Ayers, a principal of the firm since its inception in 1989, has an MBA in managerial economics and organizational behavior. She has over 16 years of experience in management consulting and 12 years as a search consultant as well as significant experience in the corporate sector.

Other Work the Firm Conducts

The firm has conducted other senior level executive searches for private and public colleges and universities, including provosts, vice presidents for academic affairs, administrative affairs, and institutional advancement. We assisted the following institutions with searches for the noted positions: Assumption College, Dean of Social and Rehabilitation Services; Benedict College, Vice President for Business and Fiscal Affairs; Edward Waters College, President and Vice President for Institutional Advancement; North Carolina Central University, Provost and Vice President for Academic Affairs and Director of Institutional Research; Saint Augustine's College, President; Saint Paul's College, Vice President for Institutional Advancement; Tougaloo College, President and Provost and Vice President for Academic Affairs; the University of Louisville, Associate Vice Provost for Diversity; Winston-Salem State University, Chancellor.

The firm also has conducted senior level executive searches for education associations, foundations, and corporations; performed evaluations of presidents and other executive officers; and conducted research studies for foundations including the Bill and Melinda Gates Foundation, Kresge Foundation, and C.S. Mott Foundation.

Measures of Success

The firm is dedicated to providing exceptional services to each and every client and adheres to the highest ethical and professional standards. Our highly qualified and experienced associates work in a collaborative manner with each client, ensuring that their needs and concerns are fully addressed in the provision of executive search services. Thus, we have received outstanding reviews from clients as well as from candidates in executive searches. Clients and candidates are contacted after placement for feedback on the performance of the firm and its consultants.

Educational Management Network/Witt Kieffer

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Fax: 212/686-2527

25 Burlington Mall Road
6th Floor
Burlington, Mass. 01803
Telephone: 781/272-8899
Fax: 781/272-6677

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Fax: 615/665-3389

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Witt/Kieffer's other offices are located in Atlanta, Bethesda, Md., Dallas, Emeryville, Calif., Houston, Phoenix, and St. Louis.

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Full Academic Presidential Searches Since 1999

2001
Bennett College
Eckerd College
The University of Virginia's College at Wise

2000
American Association for Higher Education
Aurora University
Bastyr University
Columbia College, Chicago
Hiram College
Susquehanna University
University of the Arts
University of the South

1999
Dickinson College
Hobart and William Smith Colleges
Indiana University Kokomo
Indiana University Northwest
Olivet College
St. Augustine's College

Educational Management Network/a division of Witt/Kieffer is dedicated to serving education and the nonprofit community by providing executive search consulting services to trustees, presidents, and designated search committees. The firm's approach is grounded in the sovereignty of the institutional decision process and the consultant's supportive role as facilitator, catalyst, and advisor.

Educational Management Network and Witt/Kieffer merged in 1998, unifying a group of professionals dedicated to serving educational, health care, social service, and cultural organizations. Pursuing the mission to provide outstanding leadership solutions to organizations, Witt/Kieffer and its educational and nonprofit practice form one of the largest search firms in the country but sustain a commitment to personalized service.

With offices in 13 cities, significant resources in a proprietary database, and a dedicated research team, the Witt/Kieffer infrastructure offers deep resources that enhance each consultant's capacity to respond to client needs.

Operating Principles, General Approach, Typical Process

EMN/Witt/Kieffer develops creative and market-responsive search processes that meet client needs, and we ensure that individuals who represent the firm to a client commit themselves to the actual search work to ensure a successful outcome. Consultants develop a strategic partnership with a client's board, management team, and others to assess organizational goals, identify the leadership solution, meet timelines, and maintain communication. We are committed to a candidate-centered process, and we conduct only one presidential search at a time where the candidate pools could overlap, avoiding potential conflict of interest.

A search for new leadership provides a special opportunity in the history of an institution: to reflect on past accomplishments and traditions, to renew the spirit of community and purpose, to reaffirm common values and mission, and to consider future directions. A successful outcome results from a thoughtful, inclusive process.

Because respect for an institution's individual approach to governance, culture, and traditions undergirds our work, EMN/Witt/Kieffer is committed to forging for each search project a unique strategy that combines four essential components:

- A process that embraces an institution's governance and cultural nuances and asks institutional leaders to define the vision, goals, and challenges. Honest appraisal is

crucial to defining institutional direction and the leadership needed to achieve articulated goals.
- An aggressive recruitment strategy to develop a candidate pool that meets and surpasses articulated criteria
- A communication program to inform constituencies during and after the search
- A transition plan with a post-search team in place to manage presidential transition

The cornerstone of the process is early dialogue among constituencies to articulate institutional priorities and expectations and the resultant position specification. EMN/Witt/Kieffer elicits interest in the position and follows up on nominations and inquiries. Our consultants facilitate the committee's selection of a pool for consideration. We offer an interview workshop and support the committee in its finalist selection and campus visits. We maintain communication with candidates during the course of the search and, at closure, assist the committee chair in negotiations and ensure appropriate stewardship of all involved in the search.

We help the committee and the institution to consider and manage the transition process that begins with the outgoing leader's announcement of departure and continues into the new leader's tenure. By ensuring that attention is paid to the full scope of a leadership transition, we help to ensure the immediate effectiveness and longevity of the placement.

Whether we support the client's search administrator or provide search administration services ourselves, each step of the administrative support process receives attention and input from EMN/Witt/Kieffer consultants.

Professional Staff Who Work on a Typical Search

Search professionals offer intelligence, savvy, and acumen. Each principal, consultant, and associate is engaged in the actual recruitment, assessment, and client consultative work. Typically, a presidential search has a four-member team: lead consultant, second consultant, researcher, and administrator.

The education practice director is Gary J. Posner; he is joined in leadership by principals Paula Carabelli, Nancy Archer-Martin, and Emanuel D. Berger.

The principals team with four consultants and six associates who have experience working with and for educational and nonprofit organizations, in addition to three researchers, data analysts, and support staff.

Other Work the Firm Conducts

Since 1998, EMN/Witt/Kieffer has conducted presidential searches for such other institutions as the American Association for Higher Education, Council of Independent Colleges, Nellie Mae Foundation, Woodward Academy, The Learning Tree, Universities Space Research Association, Tuition Plan Inc., Lincoln Medical Education Consortium, and Erikson Institute.

EMN/Witt/Kieffer also performs searches for vice presidents, deans, and directors for colleges, universities, academic medical centers, independent schools, and social-service, community, cultural, and other nonprofit organizations. EMN/Witt/Kieffer has supported senior administrative and academic searches at such institutions as Cornell, Emory, Indiana, Wesleyan, Texas A&M, and Tulane Universities, Wellesley and Rollins Colleges, University of Virginia, and University of Notre Dame.

Among the organizations assisted by EMN/Witt/Kieffer are the Association of Governing Boards, American Council on Education, American Cancer Society, Boys and Girls Clubs of America, Field Museum of Natural History, Kids in Crisis, Morton Arboretum, New York Historical Association, and the USO.

Measures of Success

In pursuit of our mission to provide outstanding leadership solutions to organizations committed to improving the quality of life, we commit to support our clients' efforts to achieve diversity. Our experience with predominantly minority institutions, such as Historically Black Colleges and Universities, is supplemented by our experience in placing minority candidates across the spectrum of our client institutions. We make every effort to present all appropriately qualified candidates. We have an established record of successfully placing women and minority candidates in senior administration in higher education. Women and minorities represent more than half of EMN/Witt/Kieffer's total education and nonprofit executive placements since July 1998.

Ultimately, our success is measured by the individuals we help place, through their ability to achieve goals and tasks articulated by trustees, presidents, and academic leadership. We maintain contact with clients to support transition and assess the progress of our placements. Two-thirds of our clients return to us with new projects.

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Full Academic Presidential Searches Since 2000

2001
Arizona State University
Queens College, City University of New York
Fort Valley State University
Northern Arizona University
Winston-Salem State University
City College of New York
Grand Valley State University
North Carolina Central University
University of Evansville
University of Hawaii System

2000
Sheridan College
Temple University
Texas Tech University
University of Colorado System
University of Memphis
University of San Francisco
Bradley University
Butler University
Eastern Michigan University
North Carolina School of the Arts
University of North Carolina at Chapel Hill

Heidrick & Struggles International, Inc. is one of the world's premier providers of executive level search and leadership consulting services. For nearly 50 years, we have specialized in chief executive, board member and senior level management assignments for a broad spectrum of clients. Heidrick & Struggles developed the first dedicated practice in higher education in 1975.

Heidrick & Struggles' professional staff has a broad base of experience; each consultant possesses detailed knowledge of particular geographic areas, specialties, and functions. Our internal network enables each consultant to access valuable assistance from other professionals in the firm. Further support is received from our research staff and sophisticated technology including a proprietary database containing more than 1.4 million files.

Our partnership enhances our ability to identify diverse qualified candidates for leadership positions, regardless of their current specialty. Our Education Practice collaborates with the firm's other specialty practices and professionals across more than 80 offices worldwide. We work on an exclusive basis, and we only accept those search assignments that we believe we can perform effectively.

An independent review of our clients has found that we are responsive, thorough, and timely. Clients have indicated that our candidate pool is comprehensive and includes highly qualified individuals. We believe this is due to our meticulous search process, our commitment to use technology internally, and our industry knowledge and experience.

We have an impressive record in conducting higher education executive assignments. We understand higher education, and we have access to its key leaders.

Operating Principles, General Approach, Typical Process

It is our intent to build a long-term professional relationship with our clients based on mutual trust and integrity. We believe that by working together over time we can better understand their organizational style, culture, personalities, dynamics, and can therefore provide added value through objective and informed advice. An outline of a typical search process follows:

- *Position Definition* We make an on-site analysis of the client's needs to ascertain the job description, determine work disciplines, understand organizational relationships, and define required experiences. This work includes interviewing necessary constituencies, including selected board

members, the search committee, and key administrators and staff. It is essential that all parties involved in the selection process agree on the description and the required skills.

- *Research* Our research team will access our databases and sources to spotlight individuals with the requisite skills. Our original research allows us to develop potential sources and prospects throughout the country.
- *Telephone Sourcing and Prospecting* The consultants will make selective calls to sources and prospects to identify and interest qualified individuals. During this period, the consultants will be in frequent communication with the client, reporting progress, briefly profiling possible candidates, and identifying any concerns.
- *Prospect Interviewing, Evaluation, and Screening* The process of candidate interviewing is discussed with each client. In some cases, we are asked to conduct in-depth interviews; in others, we are asked to join a search committee.
- *Presentation of Candidates* Curriculum vitae are submitted on individuals who most closely fit the client's specifications. We will then facilitate, per the client's requirements, search committee meetings. Some committees choose to review all prospect and candidate files.
- *Candidate/Client Interviews* The consultants schedule mutually convenient meetings between the client and the candidates, facilitate travel arrangements, and handle reimbursement of travel expenses. Following each interview, the consultants debrief the client and the candidate.
- *Referencing of Finalist* Once the client selects the finalists, the consultants conduct additional reference checking. At this juncture, education degrees have been verified and we often use online database services on all finalists to provide the client adequate background information.
- *Formal Offer* The consultants will provide assistance and guidance, as appropriate, during negotiations with the successful candidate and the preparation of the final compensation and relocation package.
- *Follow Up* Heidrick & Struggles will stay in contact with both the client and the successful candidate to ascertain that ongoing expectations are being met.
- *Affirmative Action* Heidrick & Struggles is committed to a policy of equal opportunity and affirmative action, a policy that extends to our executive search consulting practice. Our firm recognizes that equal employment opportunity not only is the law, but also is socially and economically desirable.

Professional Staff Who Work on a Typical Search

- *Charles B. Knapp* has experience as a president and professor in higher education. He has conducted higher education searches nationally in both the public and private sectors for presidents, provosts, vice presidents, and deans.
- *Nancy S. Nichols* has had a distinguished career in both academe and art prior to becoming a search consultant. She has conducted many searches in the philanthropic, academic and cultural sectors. Her placements include presidents of museums and foundations.
- *Betty Hasler* has more than 13 years experience in providing search services to educational institutions, with extensive experience in California and other western states. She has placed numerous presidents and senior administrators in both public and private institutions.
- *J. Veronica Biggins* has conducted national higher education searches for presidents and chancellors.

Other Work the Firm Conducts

The firm conducts higher education searches for system heads, chancellors, presidents, vice chancellors, vice presidents, provosts, vice provosts, and deans at public and private colleges and universities.

The firm also conducts searches for education-related nonprofit organizations as well as other nonprofit organizations. Other industry areas where Heidrick & Struggles provides executive recruiting services include health care, technology, professional and financial services, consumer goods and services, media and communications, utilities, and telecommunications.

Measures Of Success

- More than 50 years of executive search experience.
- The ability to guide the search committee through an expeditious and comprehensive search.
- A unique approach to each search assignment.
- A world-class search firm with a global perspective.

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Full Academic Presidential Searches Since 2000

2001
Connecticut College
Milwaukee Area Technical College
Roger Williams University
Tufts University

2000
Brown University
New England Board of Higher Education
Regis College
Chancellor, University System of New Hampshire

Isaacson, Miller is a national executive search firm devoted to recruiting leadership for the country's civic institutions. We have 45 search professionals and consultants and complete roughly 120 search assignments a year. We feel strongly that our size and definition allows us all the efficiencies of a significant volume of searches, with a varied and expert staff, while still permitting us to attend personally to our clients, to develop relationships that last, and to share readily our learning within the firm.

Isaacson, Miller was founded in 1982, at a time when nonprofit organizations and public agencies rarely used executive search firms. Isaacson, Miller's expertise in this area has grown out of its founders' public service backgrounds and commitment to finding talented people to lead and enhance civic institutions.

Many of our clients and past candidates become part of an extended network that shares our goal of working to strengthen the civic infrastructure. They see their own profound mission reflected in the work of the firm and choose to aid us, generously, in our quest for the finest talent in their fields. The country's civic community has come to recognize our persistent commitment to recruiting talent across all lines of race, gender, and ethnicity. Annually, on average, 40% of our positions over the last decade have been filled by women and 25% by people of color.

Isaacson, Miller is a mission-driven business committed to the recruitment of powerful civic leaders who raise our own and our clients' competitive aspirations. We believe that civic organizations are essential to liberal democracy and to a free market economy. They educate the entire society. They inspire innovation. They encourage the marketplace of ideas through advocacy. Through the charitable endeavors of private citizens the civic sector serves as the guardian of economic and societal strength. We have made their success our business.

Operating Principles, General Approach, Typical Process

In the last few years, we have been frequently retained by institutions across the whole field of higher education. We feel our work has given us a unique understanding of the issues facing these unusual organizations. We believe we have been successful because we have been able to identify people who combine a strong management capacity with a compelling educational mission.

We are acutely aware that these institutions are among the most complex but successful organizations on the American landscape. For students, they are the essential source of opportunity; for society, the source of new, sometimes uncomfortable knowledge; and for the economy, they are the engine of innovation and the creator of a modern workforce. American colleges and universities have powered American prominence. They create fundamental value.

As organizations, colleges and universities challenge our core understanding of both leadership and management. They contain more invested human capital than any comparable organization. They recruit the best graduates of the academy and deploy them as front line workers. They assume lifetime financial responsibilities for their tenured faculty and then surrender control over their labor. In their governance, they rival the federal government for separation of powers.

American colleges succeed because of their character, not despite it. They inspire their students and their faculties. They mobilize missions. They create opportunity. They are the most productive inventors of new knowledge on the globe. They lead young people to acquire the disciplined skills of an adult intellect and they provide a setting for personal growth. They open the doors of possibility to students who learn to imagine themselves differently. They are remarkable institutions, but they are not easy to lead or to manage.

At Isaacson, Miller, we have evolved a highly articulated search process that serves higher education presidency searches responsively and precisely. Our process is simple but structured, and we join our clients as partners in its implementation. We tailor the search to the specific circumstances of the institution in a process that is, fundamentally, an opportunity to consolidate ambitions and goals and prepare for the future. At each stage, we offer written materials, explanations, and a precise, prescheduled timetable, keeping the committee informed while diligently guarding the confidentiality of the process and those involved in it.

During the scoping phase, we meet with the search committee, with members of the board, with the essential central management team, and with appropriate groups of faculty, graduates and students. The product of these interviews and research is a comprehensive case statement, which is at the core of our thinking as we network and screen prospective candidates. We then narrow the field in concert with the search committee, offer guidance as finalists are selected, conduct extensive reference checks, and guide the client in the selection of the final choice.

Professional Staff Who Work on a Typical Search

Isaacson, Miller usually assigns two partners to lead a college or university presidency search. We are frequently joined by a senior consultant from the Washington Advisory Group, a nationally prominent strategy firm that aids some of the nation's most prestigious science and academic institutions. The partners are supported by an administrative associate, a search associate, and a researcher. Partners take client and strategy responsibility and personally staff and coach the search committee. They are aided in search mapping and candidate development by their research and search associates. The administrative associate takes prime personal responsibility for orchestrating the logistics of the search and for administrative liaison with the campus and the committee.

Other Work the Firm Conducts

In higher education, Isaacson, Miller conducts a range of senior searches for both public and private colleges and universities, including senior officers such as provosts, vice presidents, deans, directors of programs, and senior development officers. We work with agencies, such as the College Board, in the higher education field. We also undertake nationwide searches for a wide variety of organizations, including leading colleges and universities, research institutes, academic medical centers, foundations, cultural institutions, conservation organizations, community-based economic development and human service agencies, and national advocacy groups. While most of our clients are nonprofit groups, we also work with governments, select forprofit corporations, particularly those with ties to education and science, as well as with socially responsible companies.

Measures of Success

We measure our success in the long run by the capacity of our clients to achieve the aspirations they articulated with us during the course of the search.

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FULL ACADEMIC PRESIDENTIAL SEARCHES SINCE 1999

2001
CUNY - Hunter College
Colorado School of Mines
University of Nebraska – Lincoln
Indiana University – Bloomington
University of Illinois – Urbana
Iowa State University
Eastern New Mexico University
Murray State University
Marymount Manhattan College
Marymount University

2000
University of Illinois – Springfield
Purdue University
Vanderbilt University
Bucknell University
University of Massachusetts Boston
University of Massachusetts Online
Adelphi University
American Academy of Dramatic Arts
Belmont University
Clayton College and State University
CUNY – Bernard Baruch College
SUNY System
Valley Forge Military Academy
Southern Illinois University
Tennessee Board of Regents
Clemson University
National Technological University
Northern Illinois University
New Mexico State University
University of Connecticut

1999
California State University – Northridge
California State University – Dominguez Hills
Marshall University
Central Missouri State University
Texas Southern University

Founded nearly 30 years ago, Korn/Ferry International is today the world's leading management consulting firm specializing in executive recruitment. With approximately 75 offices in more than 40 countries worldwide, the firm has established a global reputation for seamless, unparalleled service to our clients.

As the industry leader, Korn/Ferry has always pioneered innovation in the profession. The firm was the first major firm to establish industry "specialty practices" that developed unique expertise about the operations and executives in singular lines of business. Consultants who dedicate a majority of their consulting time conducting searches within a specific industry have driven the firm's success and have provided our clientele unsurpassed knowledge of the best executive talent in their specific industry.

The Korn/Ferry Education Practice was founded approximately 20 years ago, and is currently the "firm of first choice" to conduct college and university president and chancellor searches. As a "firm within the firm," the Education Practice has dedicated higher education offices in Dallas, Washington, D.C., and Los Angeles. The practice has approximately 15 partners, senior associates, researchers, and administrative assistants dedicated to satisfying our clients' needs.

This structure affords our clients with the reach and resources of a large international firm, while assuring them personal, individual attention by professionals who have incomparable knowledge of the education field.

Operating Principles, General Approach, Typical Process

While there is no one way to conduct a search for a president or chancellor, the Education Practice has developed and refined an approach that not only assures our client schools thorough coverage of the targeted candidate pools, but also protects them from a "bad choice" via careful referencing, use of technology to review the public record of candidates, and other in-depth background checks consistent with appropriate laws and regulations.

So confident of its procedures and abilities is the practice that it provides its clients with a *two-year guarantee*. If the person selected to be the president or chancellor resulting from a search it conducts leaves the position in less than two years *for any reason*, the Korn/Ferry Education Practice will conduct the search again charging no additional retainer, only direct and indirect expenses.

Professional Staff Who Work on a Typical Search

The partner retained to conduct the president or chancellor search for one of the practice's clients is personally responsible for the successful execution of the assignment. While the partner can call upon the many resources of the firm—other practice partners, senior associates, researchers, and reference and technological tools—to aid the process, the search committee and/or board communicates directly with the partner. It is the partner who renders evaluations of the candidates and works hand-in-hand with the search committee or board.

The three partners who lead the KFI Education Practice cumulatively have over 50 years of search experience.

- *R. William (Bill) Funk*, managing director of the practice, is perhaps the leading recruiter of presidents and chancellors in the nation today. Selected for inclusion in the *Global 200 Executive Recruiters: An Essential Guide to the Best Recruiters in the United States, Europe, Asia and Latin America*, he has recruited more than 100 presidents and chancellors to the country's largest and most respected institutions.
- *Ira Krinsky*, who founded the practice in the late 1970s, is one of the pioneers in education search. He has recruited leaders to head major school systems, colleges and universities, and university systems.
- *John Kuhnle*, who holds a doctor of philosophy degree in history from Vanderbilt University, is well-known throughout the country and has conducted a number of president and chancellor searches domestically and internationally. He also is the foremost recruiter of higher education chief development officers in the United States.

Other Work the Firm Conducts

The KFI Education Practice also conducts numerous searches for provosts, vice presidents of academic affairs, vice presidents of development and institutional advancement, vice presidents of finance and administration, and chief information officers.

The practice also conducts many dean-level assignments in virtually every area. Most often, we are retained to conduct dean searches for business schools, schools of engineering, schools of education, and schools and colleges of arts and sciences.

Many clients retain us to return to the campus one, two, and three years after we have recruited a new president or chancellor to help the board evaluate the performance of the executive. We work as a non-threatening partner with the board to enhance the evaluation process and to contribute to the ongoing success of the chief executive.

Boards frequently retain the partners in the practice to evaluate and analyze their committee structure, performance appraisal practices, and interaction with the president and/or chancellor. In some cases, we have been asked to work with boards on difficult situations involving internal disagreements and unique problems arising between the board and the chief executive or other senior-level administrator.

Increasingly, we are asked to evaluate existing management teams on college and university campuses. Termed "organizational audits," we interview and evaluate the president and cabinet members and analyze the reporting structure within the institution.

Measures of Success

The only measure of success for the KFI Education Practice is the complete satisfaction of its clients. While the practice carefully chronicles data relative to the average tenure of the presidents and chancellors we recruit and other important indices, the practice has found that no single statistical measure captures the success standard as readily as candid feedback from its clients.

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Full Academic Presidential Searches since 1999

2001
Averett University, Virginia
Catawba College, North Carolina
Massanutten Military Academy, Virginia
Lincoln Memorial University, Tennessee
Virginia Intermont College, Virginia
Coker College, South Carolina

2000
Marion Military Institute, Alabama
Shorter College, Georgia

1999
Brandon Hall School, Georgia
Campbellsville University, Kentucky
Charlotte Christian School, North Carolina
Cox College of Nursing and Health Sciences, Missouri

We are a boutique firm whose sole purpose is to provide full-service executive search counsel to trustees as they identify, attract, evaluate, and select the new president of their institutions; and to presidents as they select their senior administrators.

Our goal is to assure that *the brightest and the best* candidates are available for your consideration and that you are competitive as you negotiate with the top candidates. We are seasoned consultants in presidential and cabinet level search, supported by established and credible relationships in education as well as the corporate community.

Since 1984, Jon McRae & Associates has recruited presidents and senior administrators exclusively for nonprofit institutions, with a concentration in private higher education. Jon McRae, a Davidson graduate, founded the firm in 1968, following several years with the Wachovia Bank and Trust Company, the Pelton and Crane Company, and as a U.S. Army officer.

Jon McRae & Associates is an optimum size, large enough to be professionally and technologically sophisticated, yet small enough to provide personal and intuitive counsel. We strive to treat each client as if you were our only client, tailoring each search to meet your specific needs and the unique culture of your institution.

We are long-standing and active members of the *American Council on Education-Executive Search Roundtable*, and are supportive of the *Association of Governing Boards* and the *Council of Independent Colleges*. Our consultants attend various annual meetings to stay abreast of trends in education.

Operating Principles, General Approach, Typical Process

Our only business is providing executive search counsel. Our goal is to enable your search committee to make a better selection from a broader pool of candidates without relinquishing control. Our consultant meets with your search committee and all constituencies to develop an Opportunity Profile that is unique to your institution. This profile gives our consultants an intimate sense of the environment and enables the committee to more accurately assess the real needs of the institution, and thus, the preferred characteristics of the ideal candidate. This thoughtful process promotes a bonding of the committee and enhances the ultimate success of the search.

Once the Profile is approved, we place advertisements in appropriate publications and on the Internet. We do an extensive mailing of the Opportunity Profile to known and prospective candidates, as well as referral sources. Next, we conduct a comprehensive telephone campaign to identify and attract prospects. We are proactive in identifying and attracting undeclared candidates and projecting a professional image of your institution. We also assume responsibility for all communications with prospects, candidates, and referral sources. Every member of our staff assists the lead consultant to assure that a professional and timely search is conducted.

After six to eight weeks we meet again with the committee to review resumes accumulated and to report on progress to date. Our goal is to focus the attention of the committee on the top twenty or less candidates, enabling it to select the top six, or more, for subsequent personal interviews with the committee at an offsite location. Normally, the top two or three candidates from the offsite interviews are invited to visit campus, during which time they meet with representatives from all constituencies. At a final meeting of the committee the top candidate(s) is selected as the nominee(s) to the full board of trustees for ultimate selection and confirmation of the new president.

We guarantee the quality of our service. In the event the new employee leaves your employment during the first year, without due cause, we will conduct a replacement search for no additional fee. Expenses would be reimbursed as usual.

Professional Staff Who Work on a Typical Search

- *Jon McRae*, president, founded the firm in 1968 and has developed a successful national practice focused in higher education. A native of North Carolina and a graduate of Davidson College, he has personally conducted hundreds of presidential and cabinet level assignments.
- *Kenneth Orr*, senior vice president, is president emeritus of Presbyterian College and formerly served as president of the Presbyterian School of Christian Education. A native of North Carolina, he is a graduate of Duke University, earned two master's degrees from Union Theological Seminary, and a Ph.D. from the University of Michigan.
- *Maureen Biggers*, vice president, is former vice president and dean of students at Schreiner University, director of an award winning Freshman Year Experience program at Mercer University, and has held several administrative positions in both academic and student affairs at the University of Miami. Her undergraduate degree is from SUNY at Geneseo, and her M.Ed. and Ph.D. are from the University of Miami.

We have four professional support staff.

Other Work the Firm Conducts

Since 1999 Jon McRae and Associates has also completed presidential searches for the Barium Springs Home for Children in North Carolina and the Indiana Humanities Council. Prior to 1999, the firm conducted presidential searches for Presbyterian College and Converse College in South Carolina, Alderson-Broaddus College in West Virginia, Franklin College in Indiana, Eastern College in Pennsylvania, Schreiner College and the Presbyterian Children's Home in Texas, William Jewell College in Missouri, the National Center for State Courts in Virginia, Oak Ridge Military Academy in North Carolina, the Georgia Humanities Council and Riverside Military Academy in Georgia, The Federation of State Humanities Councils in Washington, DC, the Alabama Association for Independent Colleges and Universities, and the Holston Home for Children in Tennessee.

We also conduct searches for cabinet-level officers who report directly to the president. We believe that this strengthens our capacity to conduct presidential searches as it broadens our knowledge of potential candidates.

Measures of Success

We believe the true measure of our success is the confidence that our clients place in us as they talk with others who inquire about our service. Our primary source of business is referrals from clients and additional searches for client institutions.

We believe that our involvement adds significant value to the quality of the candidate pool from which clients select a new president and to the professional image of the institution. We are especially sensitive to the dignity of all who are involved in the process.

Our success is based on well-developed relationships and positive results.

Morris & Berger

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Full academic presidential searches since 1999

2000
Claremont University Consortium

1999
Phillips Graduate Institute
Monterey Institute of International Studies
Otis College of Art & Design
University of South Florida
Florida Gulf Coast University

Founded in 1984, Morris & Berger is a generalist executive search firm that has developed a specialty practice serving the nonprofit sector, including institutions of higher education, independent schools, foundations, performing and visual arts organizations, and social and human service agencies. We have recruited presidents and other officers, board members, deans, directors, and professional staff.

Operating Principles, General Approach, Typical Process

We believe that the most important decisions that organizations make are about people. In our practice, we are committed to helping our clients make those decisions by providing a high-quality management consulting service in executive search. That commitment is realized in our work effort, which is underscored by integrity and professionalism.

Our practice is built on the premise that it is important to work in partnership relationships with both clients and candidates. We build equity in those long-term relationships because they are based on trust and mutuality of effort and expectation.

Search Committee involvement is a critical component to a successful search process; Morris & Berger is a facilitator to the search and our role is to move that process forward while providing a rich, diverse and qualified candidate pool from which the board can make an informed hiring decision.

Professional Staff Who Work on a Typical Search

Our practice is structured around a team approach that ensures responsiveness and dedication to meeting each client's needs. A team that consists of two partners and one associate supports every search. We conduct all of our research in-house by trained professionals. We are able to generate high quality candidate pools for our clients, in part because we control and personalize the research activity.

In addition, our principals have had personal management experience in higher education prior to entering executive search. Ms. Morris was the Associate Director of Alumni Relations at Occidental College and Dr. Berger served the University of Southern California for more than seventeen years as Director of Admissions and Assistant Vice President for Development. We are, therefore, sensitive to the concerns and workings of institutions of higher education. We have a great deal of experience working

with search committees, boards, and constituent groups and we understand the different dynamics of the search process in post-secondary institutions. As a result, we have a special sensitivity for working with diverse constituencies and for the collaborative and consensus oriented decision-making process of the academic enterprise.

Other Work the Firm Conducts

We have significant experience in recruiting executives for various functional positions as well as for presidential roles in academic and other nonprofit settings. Morris & Berger has recruited heads of independent schools, executive directors of human and social services agencies and arts institutions, and chief executive officers and board members for foundations.

We have a track record of success in recruiting deans of schools, vice presidents for advancement and university relations, vice presidents for administration and finance, vice presidents for academic affairs/deans of faculty, and chairs of departments.

Clients in education include: Education Commission of the States; Stanford University; Pomona College; Claremont McKenna College; University of Southern California; Council on Government Relations; UCLA; UC San Diego; UC Riverside; UC Davis; UC Santa Barbara; University of Idaho; Michigan Technological University; DePaul University; McKendree College; University of Redlands; Woodbury University; San Francisco Theological Seminary; University of LaVerne; California Lutheran University; California State University, Fullerton; California State University, Monterey Bay; San Diego State University; St. Mary's College High School; Cathedral High School; De La Salle High School; La Salle High School; Flintridge Prep; Curtis School; Mayfield Junior School; Chandler School; Buckley School; and Loyola High School Los Angeles.

Other clients include: The J. Paul Getty Trust; Virginia Piper Charitable Trust; New York Public Library; MoMA; The California Endowment; Children's Hospital Los Angeles; RAND; Classical Public Radio Network; James Irvine Foundation; Nord Family Foundation; Ford Family Foundation; Lemelson Foundation; Oregon Symphony; Rancho Santa Ana Botanic Garden; Casey Family Program; Weingart Foundation; Los Angeles Philharmonic; Saint Paul Chamber Orchestra; Tournament of Roses Association, to name just a few.

Measures of Success

We spend a significant amount of time assessing our practice and our performance. We evaluate the success of each search not only by the quality and diversity of the candidate pool, our responsiveness to meeting the institution's needs, and our thoroughness in due diligence, but also by tracking the record of the successful candidate after she or he has been on the job. We invest our future growth in the success of our candidate's performance and guarantee our client's satisfaction.

In addition, Morris & Berger recognizes that the value we bring to a search assignment lies in the quality of the candidate pool, a successful placement, and the integrity of the search process itself. We have specific expertise and special sensitivity for working in complex environments with different constituencies. Therefore, we recognize that our success also can be measured by our ability to facilitate the search process and move groups to consensus while helping to build institutional community.

R.H. Perry & Associates

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FULL ACADEMIC PRESIDENTIAL SEARCHES SINCE 1999

2001

Belmont Abbey College
Carroll College, MT
Gannon University
Goddard College
(REGISTRY Interim)
Guilford College (in progress)
Hood College
Iowa Wesleyan College
(in progress)
Jacksonville University
Kutztown University
of Pennsylvania
Luzerne County Community
College (REGISTRY Interim)
Mercy College of Northwest Ohio
Ohio Dominican College
Park University
Purdue University Calumet
Rivier College
(REGISTRY Interim)
Rivier College (in progress)
Rocky Mountain College
Sierra Nevada College
(REGISTRY Interim)
Southern Catholic (in progress)
Tiffin University
Unity College (REGISTRY Interim)
University of Great Falls
(REGISTRY Interim)
Walsh University
Westminster College, UT

2000

College of Mount Saint Vincent
Georgian Court College
(REGISTRY Interim)
Hood College
(REGISTRY Interim)
Jacksonville University
(REGISTRY Interim)
Kendall College
(REGISTRY Interim)
Lourdes College
Molloy College
Mount Union College
Newman University
Notre Dame De Namur University
Tri-State University
Villa Julie College

1999

Anna Maria College
Briar Cliff College
Holy Names College
Holy Names College
(REGISTRY Interim)
Iowa Wesleyan College
Muskingum College
North Dakota State University
Ohio Northern University
Reinhardt College
Saint Edwards University
(REGISTRY Interim)
University of Bridgeport
University of North Dakota
Villa Julie College
(REGISTRY Interim)
Walsh University of Accountancy
and Business Administration

RH. Perry & Associates (RHPA) is a group of senior level executives with a balanced mix of college and university presidential experience and executive-search expertise. Robert H. Perry founded the firm in 1974 and continues to lead it today. RHPA is committed to:

- devoting the time necessary to thoroughly understand the institution's mission, vision, strategic and long-range plans, and key presidential challenges and, as a result, identifying and attracting optimally qualified candidates;
- implementing with the governing board and search committee a tailored, all-inclusive process that ensures confidentiality, coalesces all constituencies, and creates a mandate for the new president;
- conducting stringent due diligence that affords the governing board comprehensive information on which to base a more considered judgment in its final selection process; and
- maintaining an outstanding track record of placing presidents who not only meet but also exceed the expectations of their new campus communities.

Operating Principles, General Approach, Typical Process

Hiring a new president is the responsibility and highest priority of the governing board. We believe that complete trust and communication with the board and search committee are essential to establishing and maintaining a full partnership. We know that every step we take reflects on the institution we serve, and we strive to represent it in a highly ethical and professional manner.

Our general approach is to learn if the incumbent president will be in place during the course of the search. We believe that many institutions are well served by appointing an acting or interim officer who is not a candidate for the permanent post; rather, one who can enhance the process by gauging the climate objectively, articulating challenges, and setting the scene for the new president.

Convinced that the appointment of an outside interim president is often an ideal solution, RHPA recommends the services of the Registry for College and University Presidents with which we have partnered, when appropriate, for nearly a decade. It is a proprietary cadre of more than 50 former presidents who are available for interim service of a few months to several years. An interim brought from the outside eliminates the need for an "acting" appointment and leaves an internal administrator's candidacy unencumbered.

The Registry is a stand-alone service that institutions are free to use when retaining another firm or conducting their own search.

We work closely with the board and search committee to tailor and implement the process that will achieve optimal results. We have published a presidential-search committee handbook for this purpose. Appendices provide examples of important documents, including a pro forma employment contract.

Professionals Who Work on a Typical Search

Our approach is to utilize a search team comprised of two principals, with one designated as lead counsel. A director of research, director of information technology, and database manager support search teams.

- *Robert H. Perry*, president, founded RHPA after serving as a presidential fellow in the White House Executive Exchange Program. Mr. Perry has more than 30 years experience in executive recruitment and staffing, the last 24 years in higher education search.
- *Allen Koenig*, RHPA's presidential search practice partner since 1993, is the former president of Emerson College and Chapman University. Dr. Koenig has successfully led more than 50 presidential searches and interim presidential placements.
- *Marylouise Fennell*, RSM, is the past president of Carlow College. Since 1991, Dr. Fennell, a Sister of Mercy, has served as senior consultant to both RHPA and the Council of Independent Colleges.
- *Thomas H. Langevin*, co-founder of the Registry for College and University Presidents, has worked in close partnership with RHPA since 1993. Dr. Langevin is the President Emeritus of Capital University.
- *Judith A. Brissette* joined RHPA in 1999 following 17 years with Western New England College. Earlier, Dr. Brissette served at the University of Toledo and College of Saint Benedict.
- *Larry H. Christman* began with RHPA on an of-counsel basis in 1999. Since 1983, Mr. Christman has served as president of the Association of Independent Colleges and Universities of Ohio.
- *Paul J. Gallagher* joined RHPA in 1999 following service as the associate executive director of the Association of Catholic Colleges and Universities (1987-1999) where he continues to serve as a senior consultant. Earlier, Mr. Gallagher had been a faculty member at Providence College and Trinity College (D.C.).
- *Neil A. Stein* joined RHPA as vice president in 1987 following a 27-year federal government career, the last 16 years as deputy executive director of the White House Executive Exchange Program.

Other Work the Firm Conducts

RHPA offers value-added services to colleges and universities that are conducting their own searches. We provide experienced interim leaders who help assure effective transition between presidencies; our principals identify and attract additional outstanding candidates to supplement the institution's top candidates; our director of research is on call to conduct extensive due diligence on finalists. Our principals are also available to governing boards and search committees to conduct workshops that focus on the search process.

The Registry for College and University Presidents draws upon its wealth of knowledge to provide consulting services to interim and permanent presidents. Among the services offered are presidential development, presidential and board assessment, institutional review, and strategic planning/budgeting.

For the academy we conduct assignments for senior level administrators. Alden-Perry Athletics Search is devoted exclusively to intercollegiate athletic administrator search (www.alden-perry.com). We also serve nonprofit organizations and the corporate sector. A portion of RHPA's search and consulting practice is performed on a pro bono basis, including trustee and director searches for presidential search clients.

Measures of Success

Since 1974, RHPA has conducted over 500 search and consulting assignments across America and abroad. Our success is measured by the satisfaction of our clients: more than 90 percent of our work is a result of former clients' referrals or repeat business. Ensuring confidentiality is a priority, as is identifying nontraditional candidates, women, and individuals of color.

The Robert W. Dingman Co., Inc.

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Full Academic Presidential Searches Since 1999

2001
Covenant College,
Lookout Mountain, GA

2000
Northwestern College
(Orange, IA)

1999
Northwestern College
(St. Paul, MN)

The Robert W. Dingman Co. is a prestigious "boutique" search firm known for the quality of its work and for having the highest ethics. No other such firm has been ranked among the top 50 United States search firms more than our five times. Although generalists, the firm conducts many searches for higher education and nonprofit organizations. Bruce Dingman is ranked among the "Global 200 Executive Recruiters."

Operating Principles, General Approach, Typical Process

We strive to help a search committee develop consensus in what they seek in candidates and to structure the search process so university constituencies feel their concerns have been taken into consideration, although control of the process rests with the search committee. We are proactive in seeking out uniquely qualified candidates who would otherwise not have indicated an interest. Also, we assist the search committee during the interviewing process to develop consensus in the candidate that suits them best and in negotiating a compensation package.

Professional Staff who Work on a Typical Search

The two principals, working either singly or together, work on a search.

Other Work the Firm Conducts

In addition to academic presidential searches, the Robert W. Dingman Company conducts senior-level executive searches for businesses and non-profits nationwide. Some of our recent non-profit clients include: Azusa Pacific University (VP-Administration), California Baptist University (CFO), International Bible Society (CEO), World Vision (COO), Sky Ranch (CEO), and Colorado Springs Christian Schools (Superintendent).

Measures of Success

Our success is determined by the success our clients enjoy as a result of our work. During regularly scheduled contact, we continually ask three questions: Is the selected candidate remaining with our client for more than a few years? Is the candidate helping the organization succeed and grow? And, will the client retain us for additional searches? If those questions are answered positively, we know we have achieved our goals.

The information on the organizations in this directory was provided by the firms themselves. The Association of Governing Boards neither implies its endorsement of their work nor attests to the accuracy or completeness of the information provided herein.

Presidential Search Guidelines and Directory is intended to strengthen the effectiveness of governing boards and trustees by providing information about board roles and responsibilities. This publication is intended to inform debate and discussion, not to represent or imply endorsement by the association or its members. Additional copies are available by calling the AGB Publications Department at 800/356-6317.

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U.S. Department of Education
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National Library of Education (NLE)
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